



To Learn More About
"Legacy Coaching"

Email Us At:

GiftPlanning@Westmont.Edu

A Legacy Plan Just For You!

To help you develop your own legacy plan, we have experienced "legacy coaches" who can help you perpetuate the values that are most important to you. Each of our legacy coaches is a seasoned professional who can guide and encourage you through the process of designing your own legacy, like a personal trainer who helps design an individual fitness plan.

Unlike a financial planner or advisor who takes control of the process and develops estate plans on your behalf, you maintain control of the legacy process as you develop your own meaningful legacy game plan with legacy coach guidance. There are no charges for Westmont's legacy coaching services.

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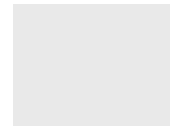
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LEGACY COACHING PROGRAM



WESTMONT
Office of Gift Planning



CREATING YOUR OWN LEGACY



* Any legal documents needed for the implementation of your Legacy Plan will need to be drafted by a qualified attorney.

WESTMONT'S LEGACY COACHING PROGRAM



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Frequently Asked Questions:

I. What is a Legacy Coach?

- A. A Legacy Coach is an experienced gift planning specialist employed by Westmont who is trained to guide individuals and families the Legacy Coaching process used in preparation of customized Legacy Plans that best represent your philanthropic desires as well as values.

II. What is a Legacy Plan?

- A. A Legacy Plan is the end result or product of the Legacy Coaching process containing a checklist of the most appropriate alternatives available to accomplish your legacy objectives based upon the outcomes you wish to fulfill through your personal legacy for future generations.

III. Are Westmont's Legacy Coaches attorneys?

- A. Our legacy coaches are former certified financial planners, not lawyers. Our coaches will work with your current legal advisers (or ones select) to draft any and all legal documents needed to implement your legacy plan.

IV. Are there any fees or charges required to work with Westmont's Legacy Coaches?

- A. No, all Legacy Coaching services are provided without charge. However, you will be responsible for fees associated with the drafting of any legal documents to implement your legacy plan. In many cases the work done by our legacy coaches can greatly reduce the amount of time a lawyer would need to devote in preparing your legal documents, thus saving you money in the process.

V. We don't have a relationship with an attorney, can you help us find one to create the documents we might need?

- A. Yes, we have a listing of local attorneys for your reference. We also have access to a national directory of qualified attorneys who are familiar with charitable gift planning.

VI. How long does it take to complete the legacy coaching program?

- A. That differs greatly depending upon the complexity of your situation. The process moves at a pace that you set.

VII. Will the information about our situation be kept confidential?

- A. Our legacy coaches take special precautions to maintain confidentiality and preserve your privacy. We will not share any information you provide to us without first obtaining written authorization from you.

VIII. Does it matter which legacy coach we work with?

- A. All recommendations and the determination of alternatives are done on a joint basis. That means that the experience, skills and talents of both legacy coaches are brought to bear on each and every case.

IX. Can we include other charitable organizations or causes in the development of our legacy plans?

- A. Of course. This will be your Legacy Plan. It is designed to reflect your individual values and benefit those organizations that best represent your values.

X. Can we make changes to the plan once we have considered the alternatives presented?

- A. By all means. Our legacy coaches will work with you to create a legacy plan that you prefer. We merely make suggestions of alternatives which we feel are appropriate for your situation and which align with your values. However, we stand ready to make any modifications until you are completely satisfied with your plan.

XI. How will your legacy coaches communicate with other professional advisers?

- A. We prefer to obtain your written permission to contact your attorney, accountant or other wealth advisers you may have in order to get their input regarding our recommendations before we ask you to consider them. Depending upon any agreements you may have in place with your other advisors, you may or may not be charged a fee for their time.



WESTMONT'S LEGACY COACHING PROGRAM



Some Definitions:

Legacy: “Something handed down from an ancestor or predecessor, money or property bequeathed to someone by will.”

Coach: “A person who gives private instruction, as in singing or acting.”

Simplify: “To make simple or simpler; render less complex or intricate.”

“Legacy Coaching” is therefore a simplified program to provide alumni, parents, faculty, staff, and friends of Westmont College with private consultation in the preparation and implementation of a personal and/or family legacy which best reflects their individual desires and values.

Our Purpose:

Westmont’s “Legacy Coaching” program was created in an effort to simplify and demystify the process of estate planning which is most often perceived as complex, difficult, time consuming and expensive. As a result many delay or neglect taking into consideration the development of a carefully thought out legacy plan. Others find that estate planning professionals tend to make it difficult for the average person to understand the details and complexity of the tax laws and legal documents. There is an additional fear that the longer the process takes the more it is going to cost. Legacy Coaching is designed to remove these barriers and help people accomplish their estate-planning and charitable objectives.